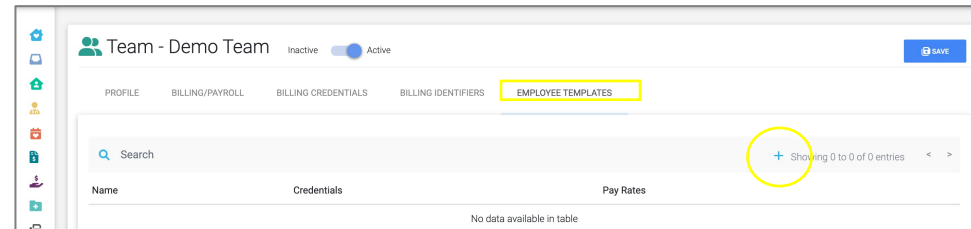


# Employee Templates

Create templates under each Team with chosen Payroll Items and HR Credentials. Templates can then be applied to new employees in the system.

**Admin> Teams> Select team> Employee Templates> + to add new> make selections in Payroll Items and/or Credentials sections> Save**



Employee Template

<input type="checkbox"/> Hourly Adult	Rate 0	<input type="checkbox"/> Hourly GB Testing	Rate 0
<input checked="" type="checkbox"/> Hourly G-tube	Rate 0	<input checked="" type="checkbox"/> Hourly IV	Rate 0
<input checked="" type="checkbox"/> Hourly Pediatric	Rate 33.00	<input checked="" type="checkbox"/> Hourly Trach	Rate 0
<input type="checkbox"/> Hourly Unskilled	Rate 0	<input checked="" type="checkbox"/> Hourly Vent	Rate 0

Employee Template

Template Name  
Skilled Nurse Template

PAYROLL ITEMS   CREDENTIALS

☐ 1099 Contract Agreement  
☐ Annual In-Services  
☒ Annual Performance Evaluation  
☐ Article 9 Certification (Every 3 years)  
☒ AZ Fingerprint Card Online Verification  
☒ Blood Borne Pathogens Test  
☐ CAPS Check (CO)  
☐ CHC Inservice  
☐ Child Abuse Clearance  
☒ Code of Ethics  
☒ Compliance Pledge  
☒ Coronavirus (COVID-19) Education Acknowledgement  
☐ COVID No Action  
☒ COVID Vaccine


☒ 90 day Evaluation  
☐ Annual Observation Visit  
☐ Annual Staff Education  
☐ Astral  
☐ AZ Fingerprint Clearance Card  
☒ Blood Borne Pathogens Training  
☐ Car Insurance  
☐ Chest X-ray  
☐ Clinical License Verification  
☒ Competency Evaluation  
☐ Conflict of Interest Disclosure  
☐ County  
☐ COVID Testing  
☐ COVID Waiver

SAVE

Optional Feature: Add rate to be applied to payroll item when using template. Can override in employee chart.

# Employee Templates

Once created, users can hover over the template's Pay Rate and Credential columns to see what selections were made in the template.

 Team - Demo Team

Inactive ☒ Active


SAVE

PROFILEBILLING/PAYROLLBILLING CREDENTIALSBILLING IDENTIFIERSEMPLOYEE TEMPLATES

+ 1-1 of 1 < >

90 day Evaluation, Annual Performance Evaluation, AZ Fingerprint Card Online Verification, Blood Borne Pathogens Test, Blood Borne Pathogens Training, Code of Ethics, Competency Evaluation, Compliance Pledge, Coronavirus (COVID-19) Education Acknowledgement, COVID Vaccine

Name	Credentials	Pay Rates	
Skilled Nurse Template	90 day Evaluation, Annual Performance Evaluation, ...	Assessment - \$0.00, Hourly G-tube - \$0.00, Hourly ...	...

 Team - Demo Team

Inactive ☒ Active

SAVE

PROFILEBILLING/PAYROLLBILLING CREDENTIALSBILLING IDENTIFIERSEMPLOYEE TEMPLATES

Search + 1-1 of 1 < >

Name	Credentials	Pay Rates	
Skilled Nurse Template	90 day Evaluation, Annual Performance Evaluation, ...	Assessment - \$0.00, Hourly G-tube - \$0.00, Hourly IV - \$0.00, Hourly Pediatric - \$33.00, Hourly Trach - \$0.00, Hourly Vent - \$0.00	...

# Employee Templates

When adding a new employee to the system, apply the employee template under the Skills/Discipline section. The chosen Payroll and Credential items will be added to the employee chart.

The screenshot shows the 'Employee - Deborah Demo' interface. At the top, there is a header with a person icon and the title 'Employee - Deborah Demo', and a blue 'SAVE' button. Below the header is a navigation bar with tabs: 'PROFILE', 'EMPLOYEE', 'DOCUMENTS', 'SKILLS/DISCIPLINES' (highlighted with a yellow box), 'CREDENTIALS', 'NOTES', and 'CALENDAR'. The main content area is divided into two sections. The top section is labeled 'Employee Template' (highlighted with a yellow box) and contains a text input field. The bottom section is labeled 'Skilled Nurse Template' and is highlighted with a blue background.

Note: Templates may only be applied to new employees or those who do not have any skills or credentials already saved.

Note: Users will see this warning when applying a template to an employee.







The dialog box is titled 'Set Employee Template'. It contains a message: 'This will remove all currently selected rates and HR credentials, do you wish to continue?'. At the bottom right, there are two buttons: a red 'NO' button and a blue 'YES' button.

# Employee Templates

Once the template is applied, the pay rates/skills and credentials will automatically be added to the employee chart.

Employee Template  
Skilled Nurse Template

SKILLS [+ New](#)







Pay Type Assessment	Rate 0		Pay Type Hourly G-tube	Rate 0	
Pay Type Hourly IV	Rate 0		Pay Type Hourly Pediatric	Rate 33	
Pay Type Hourly Trach	Rate 0		Pay Type Hourly Vent	Rate 0	

Skills and Credentials can be added or removed.

Specific pay rates can be applied to Skills.

Add in expiration dates or uploads to credentials, as needed.

CREDENTIALS [+ New](#)

Credential 90 day Evaluation x	Expiration Date	Credential Annual Performance Evalu... x	Expiration Date	Credential AZ Fingerprint Card Online... x	Expiration Date
Notes		Notes		Notes	
<a href="#">CHOOSE FILE</a> Upload your File		<a href="#">CHOOSE FILE</a> Upload your File		<a href="#">CHOOSE FILE</a> Upload your File	
Credential Blood Borne Pathogens Te... x	Expiration Date	Credential Blood Borne Pathogens Tr... x	Expiration Date	Credential Code of Ethics x	Expiration Date
Notes		Notes		Notes	
<a href="#">CHOOSE FILE</a> Upload your File		<a href="#">CHOOSE FILE</a> Upload your File		<a href="#">CHOOSE FILE</a> Upload your File	
Credential Competency Evaluation x	Expiration Date	Credential Compliance Pledge x	Expiration Date	Credential Coronavirus (COVID-19) E... x	Expiration Date